

# Sudbury Historical Society Collections Policy

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## I. INTRODUCTION

### A. Mission Statement of the Sudbury Historical Society

The Sudbury Historical Society will act as a living repository for Sudbury's tradition and history. It will maintain any property entrusted to it and collect, preserve and interpret items of historical and antiquarian significance. The Society will encourage research and involvement in these efforts by its members and the community at large. In so doing, it will promote a better understanding of history as an important factor in the everyday affairs of the Town and its residents.

### B. Role of the Collections Committee

The Board recognizes the responsibilities of maintaining the collections. To oversee the collections, the board appoints a Collections Committee and may appoint a Curator to, with the Executive Director, implement all aspects of collections policy.

Specific responsibilities of the Collections Committee include the following:

1. Formulation and periodic review of all policies for the management of the collections (Included are policies governing acquisitions, loans, de-accessions, care, management, exhibitions, and use of collections.)
2. Approval or rejection of gifts, purchases, acquisitions, de-accessions and loans.
3. Long range planning for the collections; the establishment of goals and objectives for the growth, care, management, and use of the collections, in accordance with prevailing museum and archival standards, and in support of the mission and goals of the Society.

### C. Current Collections and Future Directions

The collections of the Sudbury Historical Society are currently comprised of archival collections that serve to document Sudbury history. These collections contain both manuscript and printed materials, as well as photographs, slides and negatives, newspapers, artifacts, and drawings and models.

In addition the Sudbury Historical Society maintains a collection of artifacts that serve to document domestic life in Sudbury from pre-settlement days to the present. Most of the artifacts were donated by past Sudbury residents and as such accurately reflect domestic life in Sudbury.

The collections cover the following types:

1. Military History
  2. Politics
  3. Commerce and Industry
  4. Philanthropic and Social Service Organizations
  5. Fraternal, Civic, and Social Organizations
  6. Architecture
  7. Religion
  8. Domestic Life
  9. Schools
- And include
1. Paintings
  2. Prints and Drawings
  3. Furniture
  4. Decorative Arts

## 5. Costumes and Textiles

## 6. Tools

### 1. Establishing Current Collecting Priorities and Targeted Collecting Areas

The immediate collecting priorities should 1) reflect the current goals of the Society, 2) support current exhibit and interpretation needs, and 3) provide an ongoing structure for the routine collection and documentation of contemporary Sudbury life in order to meet the needs of the Society in the future. These are discussed further in APPENDIX 2.

### 2. Identifying Sudbury Collections in Other Institutions

The Society recognizes that its collecting interests overlap those of many other local institutions, particularly those with Longfellow's Wayside Inn, the Town Clerk, the Goodnow Library, and the Sudbury Historical Commission.

The Society wishes to support rather than compete with the other institutions throughout the town. The Society should work to identify and establish relationships with such institutions, especially identifying collections, which are not now but may in the future be threatened or available for acquisition. This may include collecting from groups and individuals, and local businesses and institutions for whom collecting is not a focus but who have amassed artifacts representing their own history and development. The Society should position itself to assume these collections should they become available (including formal arrangements to be the secondary repository).

## II. ACQUISITIONS

### A. Accession Policies

The Society shall add to the collection in accordance with the collecting priorities established by the Collections Committee. Priority shall be given to artifacts that support exhibitions, research, educational, and outreach goals of the Society. The Society acquires collections by donations, purchase or exchange. The following policies and procedures govern accessions into the permanent collection:

1. The Collections Committee, upon recommendation of the Curator and Executive Director, approves all additions to the permanent collections. Potential gifts, bequests, or exchanges shall be accepted on a provisional basis until formally accepted by the Collections Committee.
2. Material accepted into the collections must have a free and clear title. Donors may be asked to produce proof of title or sign a release absolving the Society of liability resulting from any irregularities of title.
3. The Society does not accept willingly or knowingly material that has been illegally obtained or imported, recovered under conditions deemed unethical by professional standards, or recovered at the expense of the environment, cultural sites, or a cultural group.

4. Acceptance of an artifact or manuscript into the collection is not to be construed as a recommendation or estimate of its value, quality, or historical significance.

### **B. Criteria for Accepting Artifacts and Manuscripts**

The Society makes a commitment to hold material accepted into its permanent collection. The Society recognizes that there is a financial investment in maintaining each artifact, documenting, cataloguing, storing, preserving, protecting and providing accessibility for research and exhibition. The Society uses the following criteria to determine whether or not an item is eligible for acceptance into the collection.

1. The Society only collects such historical artifacts, works of art and manuscripts that support the Society's mission to interpret the history of Sudbury. This includes materials made or used in Sudbury or by Sudbury people. Priority is given to artifacts that support current collecting priorities and the exhibition, research, and educational goals of the Society.
2. The Society does not accept into the collection artifacts that duplicate existing holdings unless they are of sounder physical condition or are a better historical example. In such cases the existing material should be considered for de-accessioning.
3. Items accepted into the permanent collection should be of sufficient historical merit, i.e. documented or of significant historical context.
4. The Society will accept into the permanent collections only those materials that it can adequately care for and store. Items not accepted will be recorded on the Temporary Custody (TC) sheet with their disposition. Dispositions can include interpretive display/props. While the Society's ability to care for objects shall be a major consideration when evaluating proposed acquisitions, current storage space or conservation considerations should not be the only criteria for rejecting material.
5. The Society accepts items only if they are of sufficiently sound condition or have the potential to be restored to sound condition.

### **C. Donations**

The Society welcomes gifts, donations and bequests of artifacts, works of art, memorabilia, and manuscripts related to the history of Sudbury. Gifts are evaluated according to the general criteria established for accepting artifacts into the permanent collection. In addition, these guidelines specifically governing gifts are to be followed:

1. All gifts are considered outright and unconditional. Objects may be used for study (including

scientific examination), exhibition, education, publication, de-accession, or other purposes consistent with its mission deemed in the interest of the Society.

2. The Society accepts only unrestricted gifts. The Society may go beyond established practice by a majority vote of the Collections Committee. In such cases, the terms of the gift should include a limit on the time for which the restrictions apply and define conditions under which the restrictions may terminate. While respecting the rights and interests of the donors, the Society must decline any acquisition accompanied by restrictions that seriously impair its use of the artifact.

3. All gifts to the Sudbury Historical Society are tax deductible to the full extent of the law for the year in which they are donated and received by the Society. The tax implications of gifts of real property are the sole responsibility of the donor.

4. Donors are responsible for obtaining their own tax valuations by a qualified appraiser prior to completing the gift. Neither the Society nor its representatives may participate in the valuation. The Society may assist donors in locating qualified appraisers. In such cases the Collections Committee will identify at least two appraisers knowledgeable in the particular collecting area. This assistance should not be construed as a recommendation of a particular appraiser.

5. Donors wishing the Society to sign IRS forms documenting gifts must provide the Executive Director with a copy of the appraisal along with the appropriate IRS form.

#### **D. Purchases**

At this time, the Society may acquire objects for its collections through purchase.

#### **E. Exchanges**

The Society may acquire collections by trade or exchange with other collecting institutions. In addition to the general acquisitions criteria, the following policies and procedures specifically govern trades and exchanges.

1. Objects removed from the collection for exchange shall be de-accessioned in accordance with the established policies, criteria and procedures.
2. All exchanges must be equitable and in the interest of the Society and its mission.
3. Exchanges are not to be made with private individuals or dealers.
4. The receiving institution is responsible for costs associated with the removal of the outgoing artifact. The Society is responsible for costs of the acquisition of the incoming object.

### **III. CARE OF COLLECTIONS**

#### **A. Recordkeeping**

The Collections Committee shall maintain records of all Society objects and manuscripts, photos, and books. Each object shall be given a permanent and unique identifying number upon accession, and all records relating to it shall bear that number. Records on individual objects, (and their component parts when applicable) and manuscript collections, shall be kept both in

traditional paper files (hard copy) and electronic/computer files (soft copy) entered into the Collections computer database. A second copy of all computer records will be kept on floppy disks or other backup format to be kept in another location to be determined. Records shall be retrievable by number, type of object, location, and donor. All information learned at time of accession shall be entered promptly into the record of that object.

Object records shall be maintained in a manner that conforms to the standards set by the American Association of Museums and Society of American Archivists. All material added to records shall be dated, and additions shall be encouraged.

Each object's record shall contain: accession number; type of object; photograph of the object if practicable; a word description of the object including dimensions, materials, style or design, date (or approximate date) of origin, place of origin, provenance, condition including any and all damage and repairs, and additional notes. Subsequent comments on condition shall be dated and signed. The Collections Committee shall be able to recommend additional examinations or evaluation.

### **B. Maintenance**

The collections while in storage or display shall be protected as much as possible from injury by heat, cold, humidity (or lack thereof), vermin, and other injurious environmental factors.

Storage and display spaces shall be secure from theft and vandalism. A SHS representative shall supervise all visitors to storage.

The Society shall seek to maintain storage facilities that conform to the most modern standards, designed and organized according to the best professional judgement of the curatorial and archival professions. The goal shall be accessible storage spaces, with each object accessible and in its discrete place, e.g. on pallet, on shelf, or hanging in a safe and secure manner.

### **C. Monitoring of display and storage spaces.**

When practicable, records of the temperature and humidity shall be kept in both storage and exhibition areas and wherever else an artifact may be located. Levels of light shall be monitored at reasonable intervals in areas where collections are located.

### **D. Transport of objects**

Special care shall be taken in regard to temperature and humidity as well as theft, loss, vandalism when any object is moved from one location to another.

### **E. Insurance**

The Society shall self-insure its collections on display in its exhibit areas, in the Society's storage spaces, or during transportation by the Society.

### **F. Installation for exhibition**

Methods of installation of objects on exhibition shall respect the integrity of the object and shall be, within reason, non-damaging to the object and, if possible, reversible.

Periodically, storage and display conditions shall be visited and monitored by a SHS representative where, when, and if mechanical monitoring is not available.

## **IV. ACCESS AND USE OF COLLECTIONS**

### **A. Exhibitions**

Public access to the Society's collection is provided through interpretive exhibitions developed by the Society.

### **B. Interpretation**

Exhibitions, publications, programs, and new media provide the primary means of interpreting the history of Sudbury.

### **C. Collections Research**

The Society's collections are maintained as a primary resource on Sudbury history. The Society is committed to studying, researching, and documenting the collections, and disseminating information for both the scholarly and the general public. The Society supports the research efforts of others. The Society shall make every effort to make collections available to scholars, researchers, members of the public, and individuals with a demonstrated interest in the artifacts. Access will be made in a manner consistent with the preservation and security of the artifacts. The appropriate levels of access - through exhibition, documentation files, photographs, or physical examination, shall be determined by the Executive Director on a case by case basis. The Executive Director may restrict access to certain collections. Access to study collections is available by appointment only.

### **D. Reproductions and Photographs**

The Sudbury Historical Society does not hold copyright on the materials in the collection. It is the responsibility of the user to obtain copyright from the original creator. The Society has the sole right to reproduce images and/or facsimiles of its collections. Reproductions of the collections must be of sound quality, accurate, and consistent with the educational mission of the Society. They must be unmistakably marked and marketed as reproductions. The Society may permit publication or other educational or commercial uses at the discretion of the Executive Director, in accordance with the prevailing professional standards and so long as that use is deemed in the best interests of the Society and is not inconsistent with its educational mission. For usage fees see APPENDIX 3.

## **V. DE-ACCESSIONING**

The term "de-accession" shall be used to mean the official transfer of artifacts out of the collection. Whenever feasible, disposition should be through gifts or exchanges to other museums or institutions, or by sale at public auction. De-accession may also be occasioned by loss through deterioration, intentional or unintentional destruction.

### **A. De-accession Policy**

#### **Periodic review**

Periodically, the Collections Committee shall review parts of the collections, add new data to the file, noting any changes in condition and reevaluate the objects' importance to the collection.

1. All de-accessions from the permanent collection are initiated by the Collections Committee and approved by the Executive Director. This information will be recorded in the database.

2. Before de-accessioning may be considered, any issues of clouded title, restricted gifts or bequests, will be resolved.
3. When considering the disposition of de-accessioned artifacts, the Society shall endeavor to respect the intentions of the donor while meeting its obligations to the integrity of the collections.
4. All dispositions by sale will be by public auction or a similar public and competitive method. The Society also may exchange with or transfer objects to similar or more appropriate institutions
5. Staff, Collections Committee members, the Trustees and SHS members may not acquire de-accessioned artifacts directly from the Society's collections.
6. All proceeds from the sale of artifacts shall be used for the benefit of the collection. The Society shall consider attaching the name of the original donor to the new acquisition-objects restored with funds from de-accessioned objects.

### **B. Criteria for De-accessioning Artifacts from Permanent Collections**

Objects shall be considered for disposal:

1. When they duplicate material represented by specimens in as good or better condition or of superior quality.
2. When they do not fall within the scope of the collection.
3. When the Society cannot care for the artifact or use it in the foreseeable future.
4. When the material has been lost through deterioration or is damaged by accident or breakage. To deem an object irretrievably damaged or deteriorated, appropriate consultation with an accredited conservator may be necessary.
5. When an artifact may be determined to be permanently lost from the collection, because of theft or documented disappearance, it may be considered a de-accession. As full documentation as possible including police report, or other file memo to explain circumstances of the disposition shall be made. De-accessioning lost material should proceed with caution, and only after complete and thorough inventory of all collections has been made.
6. When an artifact falls within the scope of the collection but is marginal and not of foreseeable use, and would be particularly appropriate to another institution.

## **VI. INCOMING LOANS**

### **A. Objects Temporarily Deposited at the Society.**

Objects that are deposited for study, examination, or other research purposes at the request of the depositor or owner, and are not incoming loans, are deposited at the risk of the owner. The following policies and procedures apply to objects temporarily deposited at the Society.

1. Artifacts deposited at the request of the owner will be treated with the same care and consideration as similar material owned by the Society, as consistent with professional standards.
2. The Society reserves the right to examine objects on deposit by technical, photographic, and other scientific means that meet prevailing professional standards, unless specifically prohibited by the depositor. The Society will accept for study only objects that are in sound condition and able to withstand ordinary handling and examination.
3. Deposit at the Society does not imply endorsement of authenticity or of historical, artistic, or monetary value.
4. It is the obligation of the depositor to remove the artifacts at the request of the SHS. At the discretion of the SHS, deposited objects not retrieved by the depositors in a timely fashion may



be stored at the depositor's expense. The Executive Director will make every reasonable attempt to return the artifacts, including by certified letter and public notice. If after all reasonable attempts to return the articles fail, objects not retrieved by the depositor will after three years be considered outright gifts to the Society.

**B. Pre-existing Long-term Loans and Objects Permanently Deposited at the Society.**

Like many institutions founded in the early 20th century, The Sudbury Historical Society may possess a number of such permanent and long term loans,.

The Society shall seek to resolve those long-standing loans, to determine and locate current owners, and to return the artifacts or to establish clear title for the Society. The Executive Director shall resolve all long-term or permanent loans, deposits, or accessions for which the Society does not possess clear title. In accordance with the laws of the Commonwealth of Massachusetts and established practice, the Executive Director will make every reasonable attempt to determine rightful ownerships and to return the artifacts, including by certified letter and public notice. After all reasonable attempts have been made to return the articles, the object shall remain on loan for only three more years, then, if not retrieved by the depositor, they shall be considered gifts to the Society in consideration for their storage and care.

**VII. Outgoing Loans**

The SHS may make occasional loans from its collections. Before a loan is made it should be approved by the Director. Records of the loan should be entered into the data base. Status of loans should be reviewed periodically.